

Tourism



Contents

	Page
The Travel Industry	5-3
Natural/Cultural Areas Attract Travellers	5-4
Attributing Expenditures to Rivers, Trails and Greenways	5-6
Marketing Potential	5-9
How To Use These Rationales in Your Community	5-10
Sources of Information	5-13
Considerations In Using These Rationales	5-15
References	5-17

Greenways, rivers and trails which attract visitors from outside the local area can stimulate the local economy. This section begins with examples stressing the importance of natural and cultural areas for attracting visitors, followed by examples showing how rivers, trails, and greenways can contribute to the travel and tourism sectors. The last subsection demonstrates how corridor projects can increase tourism appeal and marketing potential of a local community.



The Travel Industry

Travel and tourism is the leading employer in several states and has been predicted to be the leading industry in the United States and the world by the year 2000. Travel is also a leading industry and source of jobs within regions and local communities, and is increasing in relative economic importance. Expenditures for travel and tourism impact transportation, lodging, eating establishments, retail, and service businesses. These expenditures support jobs, personal income, and government tax revenues.

■ Travel industry employment for 1989 increased by nearly 3 million jobs from 1988. This employment includes air transportation, intercity highway travel, eating and drinking establishments, hotels and motels, and amusement and recreation services. The travel industry has continually out-performed the overall economy in creating new jobs. (U.S. Travel Data Center, 1989, 1990).

■ In 1992, travel-generated visitor expenditures in California reached approximately \$52.8 billion. These expenditures generated \$938 million in local taxes, \$2 billion in state taxes, 668,000 jobs and \$11.5 billion in payroll expenditures.

For purposes of this section, “travel and tourism-related expenditures” refer to those visits that originate from beyond the boundaries of your local economy. Typically, these are trips from at least 50 miles away and any trips which may involve an overnight stay. Expenditure patterns for visitors are usually higher than for local users. Spending by residents is discussed in Section 2 of this Resource Book.

A greenway, which provides local opportunities and enhances tourist draw, can be an important asset to your community. Recent trend analyses show that



weekend trips to nearby areas are on the increase, while the traditional two-week summer vacation is on the decline for today's travellers. This is due to the job complications of two-income families, limited time budgets, interest in more specialized recreation experiences, increased mixing of personal and business travel, and year round schools.

Natural/Cultural Areas Attract Travellers

Outdoor recreation, natural, historical, and cultural resources are increasingly important attractions for travellers. Ecotourism is an environmentally responsible form of travel in which the focus is to experience the natural areas and culture of a region while promoting conservation and economically contributing to local communities (Adventure Travel Society, 1994). Ecotourism is one of the fastest growing areas of the travel industry. According to the *Travel Industry World Yearbook*, in 1992 ecotourism comprised 10 to 20 percent of all travel (Bangs, 1992).

■ A poll commissioned by the President's Commission on Americans Outdoors found that natural beauty was the single most important criterion for tourists in selecting a site for outdoor recreation (*Scenic America*, 1987).

■ In a recent report, the governors of five New England states officially recognized open space as a key element in the "quality of life" in their region. They credited "quality of life" as providing the foundation of a multi-billion dollar tourism industry and bringing rapid economic growth to the region (Governor's Committee on the Environment, 1988).

■ Ramsey Canyon Reserve and the San Pedro National Conservation Area (RNCA) in southern Arizona attract a significant number of visitors from outside the local area. Approximately two-thirds of the visitors to these sites are from outside of Arizona and approximately 5% are from the United States. These visitors bring economic activity not only to southeastern Arizona, but to the state as a whole. The typical non-resident visitor to Ramsey Canyon spends \$55 per day in Sierra Vista, while a non-resident visitor to the San Pedro RNCA spends \$51 per day in Sierra Vista. The total eco-

nomic impact in the Sierra Vista area associated with nature-based visitors to Ramsey Canyon and the San Pedro RNCA is estimated at nearly \$3 million per year (Crandall, Leones, and Colby, 1992).

■ Several kayak outfitters have teamed up with environmental groups working to protect and enhance the quality of the San Francisco Bay in northern California. This cooperative effort has resulted in naturalist-lead kayak tours of the bay which raise funds for the effort to improve the ecological integrity of the bay (Sunset Magazine, 1994).

In 1988, 75 percent of all travel was for pleasure. Outdoor recreation and entertainment are growing in importance and accounted for 41 percent of pleasure travel, while 34 percent was attributed to visiting family and friends. Business travel accounted for 17 percent of all travel in 1988, with the remaining 8 percent attributed to personal and other reasons.

Travellers are also increasingly attracted to educational-oriented experiences provided by cultural and historic sites. Along with recreation and beautiful natural sites, tourists cite cultural heritage as one of three major reasons they travel to specific locations (U.S. Travel Data Center, 1991).

One of the fastest growing areas of tourism includes cultural and historic community festivals, events, and competitions. This will be a boon to community-based tourism. Greenways and trails can provide a link between historic and cultural sites. For example, the Azalea Trail in Mobile, Alabama, serves as a city beautification project and attracts tourists. Because preservation of these historic sites serves as a stimulus for tourism, there can also be significant impacts to the local economy.

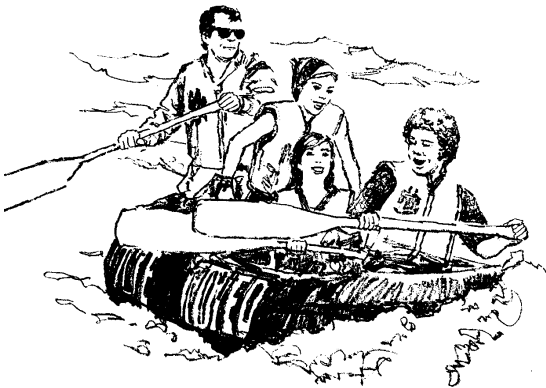
■ A 1993 study by the Travel Industry of Association of America shows that 35 percent of 1500 respondents intended to visit an historic site while on vacation. A separate study notes that visitors stay a half-day longer and spend \$62 more at historic sites than at other locations (Wall Street Journal, 1993).

■ In less than a decade, the establishment of Lowell NHS in Massachusetts, spurred the economic renewal of a repressed

economy. The city of Lowell is prosperous and vibrant today. Investment by the public sector has totalled \$122.7 million (including \$18.7 million from the National Park Service to establish the National Historic Site.) For every \$1 of public investment there has been a total private investment/return of \$7. (Cassandra Walter, Superintendent Lowell National Historic Park, 1989)

Attributing Expenditures to Rivers, Trails and Greenways

Greenways, rivers, and trails can have varied levels of tourist draw. They can be travel destinations in themselves, encourage area visitors to extend their stay in the area or enhance business and pleasure visits. The “level of tourist draw” determines the appropriate proportion of the visitor’s time and travel expenditures that can be attributed to the greenway. If visitors extend their trip an extra night to visit a greenway, the additional night’s lodging and meals can be attributed to the greenway.



■ San Antonio Riverwalk is considered the anchor of the tourism industry in San Antonio, Texas. Tourism is the second largest economic sector in the city, accounting for \$1.2 billion annually. An auto survey concluded that the Riverwalk is the second most important tourist attraction in the state of Texas (Richard Hurd, San Antonio Department of Parks and Recreation).

■ In 1988, users of the Elroy-Sparta Trail in Wisconsin averaged expenditures of \$25.14 per day for trip-related expenses. Total 1988 trail user expenditures were over \$1.2 million. Approximately 50 percent of the users were from out-of-state, and the typical user travelled 228 miles to get to the trail (Schwecke, et al., 1989).

■ In Montana, an estimated 75,000 visitors to the upper Missouri Wild and Scenic River, and Lewis and Clark National Historic Trail, contribute \$750,000 annually to the economy of the area around the 149 mile river corridor (Bureau of Land Management, 1987).

■ Once trail construction is complete along Sonoita Creek in Patagonia State Park, near Nogales, AZ, the trail is projected to bring \$150,000 into the area from increased visitation. The Arizona

State Parks Board purchased seven square miles of riparian habitat along Sonoita Creek from Rio Rico properties who planned to build homes on the site (University of Arizona Water Resources Center, 1994).

■ More than 600,000 Americans took a bicycle vacation in 1985. Touring cyclists, when travelling in a group, spent \$17 per day (camping), and \$50 per day (staying in motels). Cyclists travelling alone spent an average of \$22 per day (camping) and \$60 per day (motels) (Moran, Wilkinson, and Fremont, 1988).

■ River recreation in Oregon is one of the activities that attracts people from other areas. In the Columbia Gorge region (consisting of the Hood River and Wasco Counties), revenues from transient lodging taxes grew just over 25 percent during 1992/93, following a similar increase of approximately 21.4 percent in the previous fiscal year (Oregon Tourism Division, Economic Development Department, 1994).

■ Anchorage, Alaska hosted two U.S. National X-Country Skiing Championships in 1991. It was estimated that the competitors and their companions, totalling approximately 1,000 people, in these two events spent almost \$1,200,000 during the course of the competitions, both of which lasted just over one full week (Hill, 1991).

■ The Gauley River is a high quality whitewater rafting and kayaking resource in West Virginia. It is growing in popularity and increasing its economic impact on the surrounding region. Dam releases provide whitewater opportunities on a 24 mile stretch of the Gauley for 10 to 25 days in the fall. The rafters, during this short season, generate almost \$20 million in economic activity in the region. Every \$1 spent per visitor day generated \$2.27 of sales in the state. Each visitor day generated an average of 1.79 days of employment. Economic rationale was instrumental in precluding potential additional dam construction on the Gauley; it was recently designated a National Recreation Area (Logar, et al, 1984).

- On North Carolina's Nantahala River, raft trip participants increased approximately 700 percent between 1972 and 1981. Rafters generated \$1.8 million in expenditures in 1982. (Swain County Board of Commissioners, 1982).

Tour operators, outfitters, and guides are also important to local economies due to the expenditures their businesses generate, the fees they pay to operate, and their advertising and promotion of local resources. Some companies such as "A Day In Nature," based in San Francisco, which offers a day in nature complete with a gourmet picnic and door-to-door transportation, have capitalized on the demand for nature-oriented experiences.

- Backroads, a U.S. travel outfitter, offering a range of trips from bicycling to hiking, competes with 200 other U.S. travel outfitters. One of these other companies, All Adventure Travel, added 200 vacations to its catalog of 500 in 1993. Purchases of accessories for adventure travel can have impacts on companies like Coleman Co., which increased 1992 camping-goods sales by 21 percent to approximately \$66 million in 1993 (San Francisco Examiner, July, 1994).

- The total economic impact of commercial river rafting in Colorado was estimated to be approximately \$70 million in 1991. This estimate is based on 410,000 user days with an average expense of \$65.80 per day per user, using an economic multiplier of 2.56 (Colorado River Outfitters Association, 1992).

- An Oregon study of guides and packers indicates that in 1986, the outfitter/guide industry in Oregon (for, river, land, and marine activities) had a direct economic impact of \$42.5 million. This resulted in a total economic impact of \$300 million (Bureau of Land Management, 1987).

- For every \$1 paid to canoeing outfitters, customers spent \$5 for gas, groceries, restaurants, campgrounds, and other lodging. 70 canoe liveries in Florida generate \$38.5 million per year (Stout, 1986).

“Volkssporting,” “Volksmarching,” and other similar types of activities may also be ideal for attracting tourists to local communities. Volkssporting, meaning “sport of the people,” organizes non-competitive public events open to all ages. The events include walking, bicycling, swimming, and skiing. Many participants travel to events regionally.

- An issue of the *American Wanderer* advertised volkssport events on trails in the state of Washington. Sponsored by the Washington Bed and Breakfast Guild, trail maps and event information are available from the Guild and local inn owners. (American Volkssporting Association, 1989)

Marketing Potential

Rivers, trails, and greenways provide unique resources which nearby travel and tourist-serving establishments, chambers of commerce, and local visitors bureaus can capitalize on and feature in their advertising. Because a greenway is a desired and profitable amenity for these businesses, they may also be willing to contribute to the funding and development of the greenway.

- As a condition for development, the Campbell Inn (Campbell, California) was required to provide an easement for the Los Gatos Trail. Upon realizing the marketing potential of the trail, developers constructed part of the trail, an additional spur, and now provide rental bicycles for hotel guests. They also promote the trail in their brochure: "For fitness and fun, The Campbell Inn offers a jogging/ biking trail connecting to a full series par course which . . . runs along a scenic trail, passing through forests and alongside a stream and two beautiful lakes." Room rates at the Campbell Inn range from \$80 to \$275 per night.
- Implementation of the Yakima Greenway spurred many business changes in the city of Yakima, Washington. The Rio Mirado motel credits their almost year-round occupancy to their proximity to the Greenway. Marti's restaurant built a patio adjacent to the Greenway and enjoys increased business from trail users and hotel guests. Svend's Mountain Sports, a mountain climbing and cross-country ski shop, now stocks mountain bikes and roller blades due

to the opportunities created by the Greenway. Svend's would like to set up a rental concession on the Greenway during the summer season. Even nearby auto dealerships invite people to buy their next car at the "Greenway Auto Plaza" (Feasey, 1989).

How to Use These Rationales in Your Community

Quote examples. Choose relevant information from the examples provided to include in newsletters and presentations. Gather your own testimonies from lodging, restaurant owners, and travel agents in your community. Cite quotes from their promotional materials and advertisements.

Find out whether any studies have been done in your area. Contact local university departments of tourism, recreation, business, or economics, to see if anyone has done research or special projects related to the economic impacts of tourism in your area. Discuss your greenway with them. Also contact federal, state, regional, and local agencies to see if there are any relevant studies. At the state level, try the agencies that govern commerce and tourism. At the regional and local levels, try local convention and visitors bureaus, chambers of commerce, marketing specialists, and major banks. There may be current reports on average tourism expenditures in your community.

Depending upon what studies you can acquire, and their focus, you may be able to adapt them to your needs. Consult the authors of those studies, or other specialists, before doing so.

Determine the influence of natural/cultural resources on travel trends. Determine how natural/cultural greenway-related resources play a part in determining travel preferences and trends in your area. Cite examples with which your audience will be familiar. Look at promotional materials in your area, including newspapers, brochures, magazines, and phone books to see how resource-based attractions are being promoted and featured in advertisements. Check with your local visitor information center.

Get to know your visitors. Find out who your visitors are; where they come from; why they visited the greenway; how long they are staying in the area; what brought them there; and their expenditures while in the area. This can be accomplished in a variety of ways, ranging from casual conversations with

visitors at the greenway, to intensive phone, mail, and/or visitor interviews at greenway entrances. It may be possible to do surveys of local overnight accommodations and businesses along the greenway. The appropriate method will depend upon the desired level of detail and reliability of results.

■ A survey of visitors to the Northwoods area in Wisconsin found that almost 1.5 million non-residents visited this area in July and August of 1987. These non-resident guests spent almost \$153 million in July and August of 1987, with an average daily expenditure of \$14.66 per person. Table 5-2 was generated from this information. Many tourism expenditure studies focus upon guests staying in commercial lodging facilities. This study illustrates that those staying in camp grounds, or with friends and relatives, are also an important part of total visitor expenditures.

Figure 5-2

Northwoods Non-Resident Visitors; Type of Lodging, and Percent of Total Expenditures by Type of Lodging		
Lodging Type	Percent of Total Non-Resident Visitors	Percent of Total Non-resident Expenditures
Resorts	25.8%	39.7%
With Friends and Relatives	17.3	10.8
Second Homes	15.2	29.6
Motel/Hotel	8.6	7.1
Campgrounds	16.7	10.4
Day Trip	12.3	1.6
En Route Somewhere Else	3.9	0.8
	99.8%	100.0%

Source: Gray, Hamilton, and Mistele, 1987.

Determine the level of visitor draw of your resource. Is it a destination in itself? If not, would visiting the greenway require people to spend more time, or the night, in your area? Would it encourage business and pleasure travellers to patronize businesses near your resource, or pay more to stay, dine, or shop near it?

Estimate where expenditures are going. Your promotion will have more impact if you can state who benefits from tourism expenditures. This may include tax revenues, jobs, and payroll expenditures.

Estimate corresponding expenditures attributable to your resource. The level of visitation to your project will determine the type and amount of expenditures that can be attributed to it. If your greenway project is a separate destination in itself, the resource can be credited with all or most of the expenditures associated with the visit. If a greenway encourages staying another day in your area, figure the expenditures associated with spending one night and the following day, and credit the resource with that amount. If people will pay more to be near the greenway, find out how much, and credit the resource with that amount. Expenditures in your area can include transportation, food, lodging, entrance fees, outfitter/guide fees, and taxes.

- A survey of expenditures associated with recreational use of the St. Croix River (Maine and New Brunswick), found that anglers spent over six times as much per person, per day, in the local Maine economy as canoeists and over four times as much as general vacationers. In fact, anglers spent more in the local economy than all other recreationists combined (Miles, 1987).

Design your visitor surveys to determine what types of activities visitors participated in; how much each visitor spent per day for food, lodging, retail products; and other visitor-related services. The survey results would then provide an estimate of total annual expenditures. Sample survey questions are listed in Appendix C.

If you cannot perform a site-specific survey, the expenditure information in Table 5-13 on page 13, may be applicable. You should note the year the expenditures were calculated for Table 5-3 or any other study findings you may use. Remember the actual value of money changes each year. You should always be certain you work with expenditures calculated for the same year, or corrected for inflation (see Appendix B).

Project impacts from changes in visitation. If travel trends and/or potential greenway management changes are expected to alter visitation to your greenway, you may be able to quantify the economic impacts of this change. To do this, you need to estimate the increase in expenditures and use relevant multipliers if available.

Estimate total impacts. If you have economic expertise on your staff or within your citizen group, you may be able to estimate total impacts. Visitor expenditures for your project can be estimated by conducting a survey. Once you have determined the expenditures, you can use appropriate multipliers to determine the total impacts. Multipliers for your city, county, or state may already be available.

Promote your resource to the tourism community. Develop a plan for marketing your greenway. Be careful the designated name of the project and any related brochures or information, accurately reflect the nature of the project and create the image you desire. Combine efforts with tourism promoters such as the local Chamber of Commerce, hotels, event planners, travel agents, convention and visitor bureaus, tour guides, and transportation operators to include promotion of the greenway in their literature/brochures. Assist in distributing this information to visitor centers, conference centers, and other traveller information locations.

Sources of Information

The U.S. Travel Data Center. The U.S. Travel Data Center (USTDC) is a national non-profit center for travel and tourism research. The Center publishes the following reports:

Outlook for Travel and Tourism
Economic Review of Travel in America
National Travel Survey
Survey of Business Travellers
Annual Travel Outlook Forum

According to Center publications, USTDC maintains the only national economic model for estimating annual travel expenditure and their economic impact on cities, counties, and states (USTDC, 1989). The USTDC will perform research on the economic impact of tourism at various levels. To determine costs for these services, contact the USTDC in Washington, D.C., at (202) 408-1832.

Table 5-3

Tourist Expenditures, by Activity				
Activity	Location	Expenditures	Year	Source
Sailboarding	Columbia Gorge (Oregon)	\$47 - \$85	1987	Povey, et al'88
Long distance	Elroy-Sparta Trail (Wisconsin)	\$25	1988	Schwecke, et al 1989
Cross-country	Northwoods (Wisconsin)	\$17	1978-79	Cooper, et al, '79
Bicycle touring	United States	\$17 - \$50	1986	Moran, '86
River recreation	Upper Delaware	\$20	1989	Cordell & Bergstrom, '89
Canoeing	St. Croix River (Maine)	\$15		
Angling	St. Croix River (Maine)	\$42		
River Rafting	Gauley River (West Virginia)	\$60 - \$133	1989	Logar, et al, '84
	Colorado	\$65	1991	Colorado River Outfitters Assoc., '92
Nature Conservation	Sierra Vista (Arizona)	\$51	1991-92	Crandal, et. al., '92

Note: The above table includes a column for the year these expenditures were calculated. Because the actual value of money changes each year, always be certain to work with expenditures calculated for the same year, or corrected for inflation.

Discover America: Tourism and the Environment. This publication, prepared by the U.S. Travel Data Center and published by the Travel Industry Association of America, provides a survey of current environmental efforts, consumer attitudes toward those efforts, and business and government responses to emerging consumer attitudes. Contact the Travel Industry Association of America at (202) 408-8422 for this publication.

Impact of Travel on State Economies. This publication from the U.S. Travel Data Center includes information concerning travel spending in each state, and the employment, payroll, income, and tax revenue generated. Reports are available for 1984, 1985, 1986, and 1987. The 1987 report, released in April 1989, is available from USTDC for \$70.

Tourism USA. Published by the U.S. Department of Commerce, *Tourism USA - Guidelines for Tourism Development* is a valuable resource for those interested in any of the following: appraising tourism potential, planning for tourism, assessing the product and market, marketing tourism, determining necessary visitor services, and obtaining assistance. It is targeted at local communities interested in initiating or developing tourism.

Rural Tourism Development Training Guide. This training guide, published by the University of Minnesota Tourism Center, is part of an education training package which includes a video highlighting case study communities of San Luis, Colorado; Dahlonaga, Georgia; Sandpoint, Idaho; and the Villages of Van Buren, Iowa. Contact the Minnesota Extension Service Distribution Center at (612) 625-8173 for more information.

Considerations in Using These Rationales

Use existing information. Make every effort to use available, existing information. Generating original economic impact information can be time consuming and expensive. When adapting existing information, list the assumptions and limitations of your analysis.

Use good survey methods. Consult with someone experienced in designing and conducting surveys, and interpreting survey results. Someone on your staff may have these skills. If not, contact your local college or university. Be wary about using license plate tallies to determine visitor origin, since a high

percentage of domestic and international tourists use rental cars to explore the countryside. If possible gather survey information that is comparable to locally published per person tourism expenditure data.

Be careful in the policy implications of your results. Be careful in considering the implications of your analyses and the tradeoffs between tourism/economic development and resource protection. For example, development of vacation homes or tourist attractions in the local area may bring dollars to the economy, but could also completely alter the community and its ecological character.

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